

=====

Note for Neidle, Bruce

*** URGENT ***

From: Burns, Barbara

Date: Tue, Sep 24, 1996 3:58 PM

Subject: Nielsen Integrated w/e 9/14/96

To: albimino, sam; Anton, Mark; Anton, Michelle; Barrus, Veena; Beane, Tim; Berenson, Donna; Berg, Marc; Bischoff, Jim; Blumenson, Gail; Bonhomme, Jeanne; Braziel, Karen; Broeman, Ina; Bugg, Joy; Burns, Barbara; Castor, Stacey; Chacko, Bob; Chaump, Joe; Clary, John; Cohen, Denise; Conrad, Nancy; de Castro, Jose; Eastburn, Gary; Eibon, Jeanne; Eisen, Karen; ellis, cathy l; Ellis, Natalie; Enger, Chris; Fawcett, Gina; Fernandez, Pascal; Ferrin, Robert; Funness, Laurie; Galan, Nancy; Garguilo, Thomas; Gawronski, Edward; Gee, Edward; Gilbert, Jacquie; Glastein, Harvey; godwin, paul o; Goldfarb, Arthur; Gordon, Mary; Gordon, Rebecca; Greene, Julie; Greer, Vanessa; Harwood, Hunter; Hemp, Jeff; Hopkins, Barry; Intogna, Joann; Isaacs, Jerry; Johnson, Keith; Johnson, Lillian; Joyce, Ed; Kanefield, Susan; Keim, Tom; Kohli, Urvashi; Lauinger, Thomas; Leger, Karl; Lewis, Arlene; Lichtman, Jennifer; Lincoln, Jeanne; Lobosco, Enza; Long, Henry; Maggio, Melinda; Margolis, Jerry; Marin, Wendy; McAdam, John; McEncroe, Katie; McGovern, Tim; Medakkar, Satish; milby, david l; Miller, Dennis; Miller, Joe; Moore, Deneen; moose l, jim d; Murphy, Dan; Murphy, Mike; Neidle, Bruce; Nelson, Doug; Ng, Ellen; Nicholes, Nichelle; Nielsen Client Service; Norris, Susan; O'Brien, Sheila; Park, Kathy; Patel, Shwetal; Peta, Beth; Piskor, Stephen; Platteter, Mary; Potter, Deborah; Rafferty, Shelby; Reich, Susan; Resman, Tess; Reuter, Barbara; Richardson, Renee; Rothman, Alina; Rubin, David; Rush, Sonya; Sabini, Rosemary; Saloun, Tom; Salzman, Michelle; Sansone, Jodi; Sarmiento, Roberto; Schroeder, Mary; Schwartz, Andrew; Schwartz, Linda; Shah, Biren; Sherman, Catherine; Sikand, Yash; Simons, Renee; Sinha, Arun; Slone, Michael; Smith, Peggy L.; Spann, Warren; Spector, James; Steen, Lauren E.; Streng, Dina; Suter, Norma; TenBarge, Dave; Timm, Christian; Tolchinsky, Karen; Tomlinson, Bonnie; Turner, Jonathan; Vander Putten, James; von Gernieten, Ann; Webster, Ross; Weiner, Russell; Weinstein, Barbara; Werth, Doug; Whalen, Roy; Wheelock, Amy; Whitson, Jeff; Willard, Howard; Yates, Margaret; Yenkevich, Kim; Young, Tracy

File(s): AOC Share w/e 9/14/96; CS 800 Promo w/e 9/14/96; CS 800 Share w/e 9/14/96; Memo 9-14-96 (General)

Enclosed please find the Nielsen Integrated Report for w/e 9/14/96.

Following are the highlights:

ALL OUTLETS COMBINED

- PM's share increased +0.2 points versus week-ago to 50.1% (from 49.8% last week due to rounding).
- Marlboro's share advanced +0.2 points to 34.1% (its highest level to date), likely benefiting from increased availability of the B3G1F promotion, up +6 points to 47% of stores (all outlets combined).
- OPB's share remained essentially unchanged this week at 8.9%, as Virginia Slims' gain was offset by Parliament's loss.

2062337444

- Basic's share of industry increased +0.1 point to 4.7% this week, while its share of category increased +0.5 points to 17.8%. Basic's gain was likely influenced by expanding incidence of money-off deals.

- The Discount category declined -0.2 points week-to-week to 26.4% (due to rounding), as Basic and Liggett PL gains were more than offset by GPC, Misty and RJR PL losses.

- Doral's share remained at its highest level year-to-date in mass merchandisers at 7.1%, likely benefiting from continuing money-off support in this trade class.

- Among the competitive premium brands, Newport and Winston incurred the only weekly share losses of at least -0.05 points, while Vantage posted the only week-to-week share gain (of at least +0.05 points).

CONVENIENCE STORES

- PM's share increased +0.3 points this week to 51.1%, driven primarily by Marlboro and Basic gains.

- Marlboro's share advanced +0.2 points versus week-ago to 36.6% (its highest level to date), likely benefiting from continued implementation of the Marlboro B3G1F promotion.

- Marlboro B3G1F share was up +0.6 points week-to-week to 3.8%, while incidence expanded +4 points to 55% of c-stores.

- PM OPB's share was unchanged versus week-ago at 7.8%, as Virginia Slims' gain was offset by Merit and Parliament's loss (B&H was unchanged this week).

- Basic's share of industry increased +0.1 point to 4.8%, likely benefiting from expanding money-off incidence at 24% of c-stores coupled with continuing free product activity (primarily B2G1F deals). Basic's share of category was up +0.4 points to 17.9%.

- The Discount category's share declined -0.1 point this week to 26.7%. GPC and RJR PL incurred the largest weekly share losses (-0.1 point each), while Basic, Doral, and Liggett PL posted the largest share gains (+0.1 point each).

- GPC's money-off incidence declined -2 points this week to 39% of c-stores.

- Among the major competitive premium franchises, Newport and Kool incurred the largest weekly losses (of at least -0.05 points). Vantage posted the only week-to-week competitive premium share gain, up +0.1 point to 1.0%.

- RJR's money-off support decreased -2 points on Camel (to 37% of c-stores) and increased +2 points on Winston (to 38% of c-stores) this week.

2062337445

=====